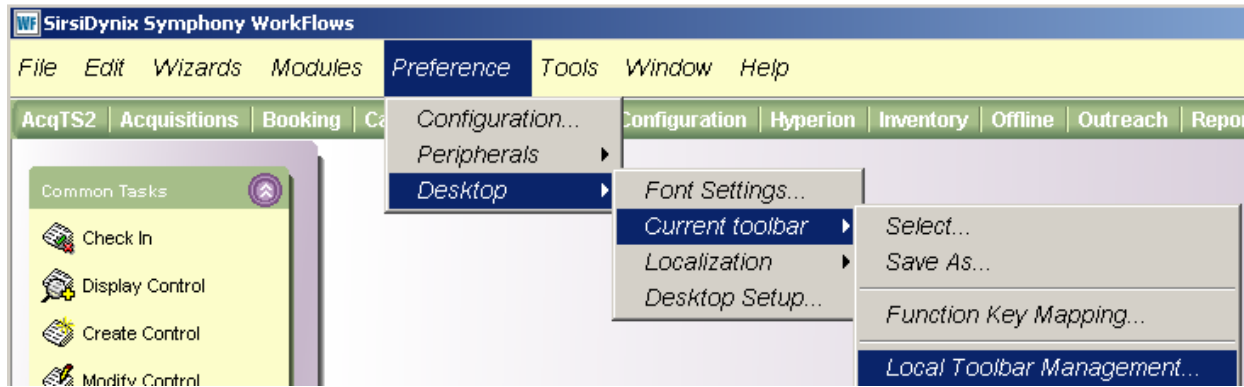


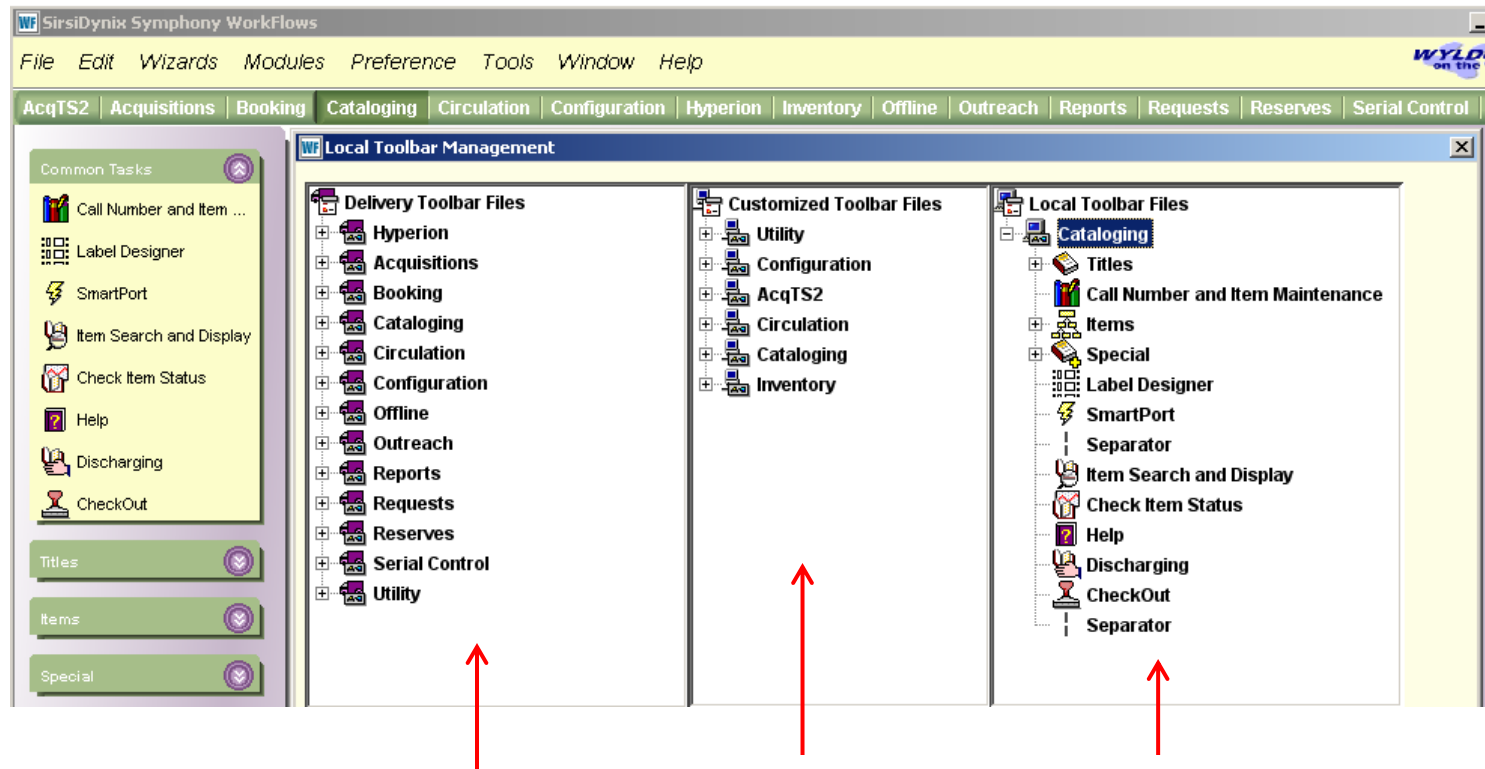
WYLD TECHNOTE: Creating a Customized Toolbar



To create a Customized Local Toolbar:

1. Click on Preference > Desktop > Current toolbar > Local Toolbar Management.

If there are any Customized LOCAL Toolbars the system uses that customized LOCAL Toolbar before it uses a toolbar from the center column of the Customized Toolbar Files. The toolbars in this center column of the Local Toolbar Management window are those toolbars customized by WYLD. Toolbars in the column on the far left are the Delivered Toolbars. If there are no toolbars in the other two columns, the user will be using those Delivered Toolbars.



Used if no Customized
or Local Toolbars exist

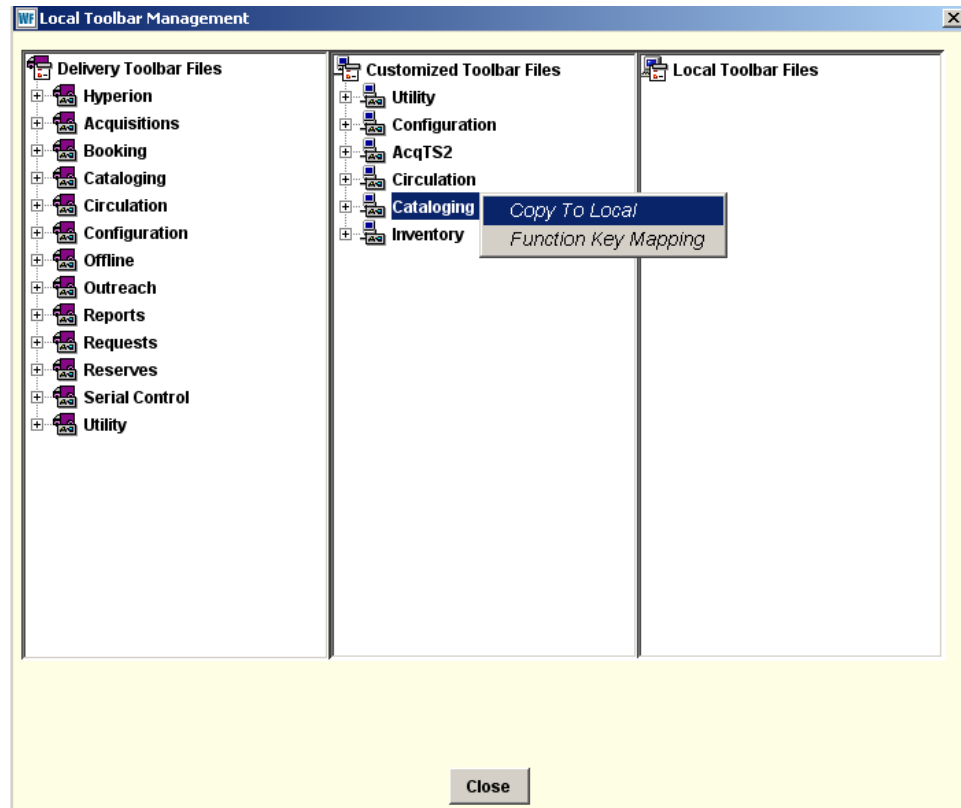
Used if no
Local Toolbar
exists

Used 1st

Copy Cataloging Toolbar from Customized Toolbar Files to Local Toolbar Files

2. Select a toolbar from the Customized Toolbar Files or from the Delivery Toolbar Files. Right click on the Toolbar to be copied.

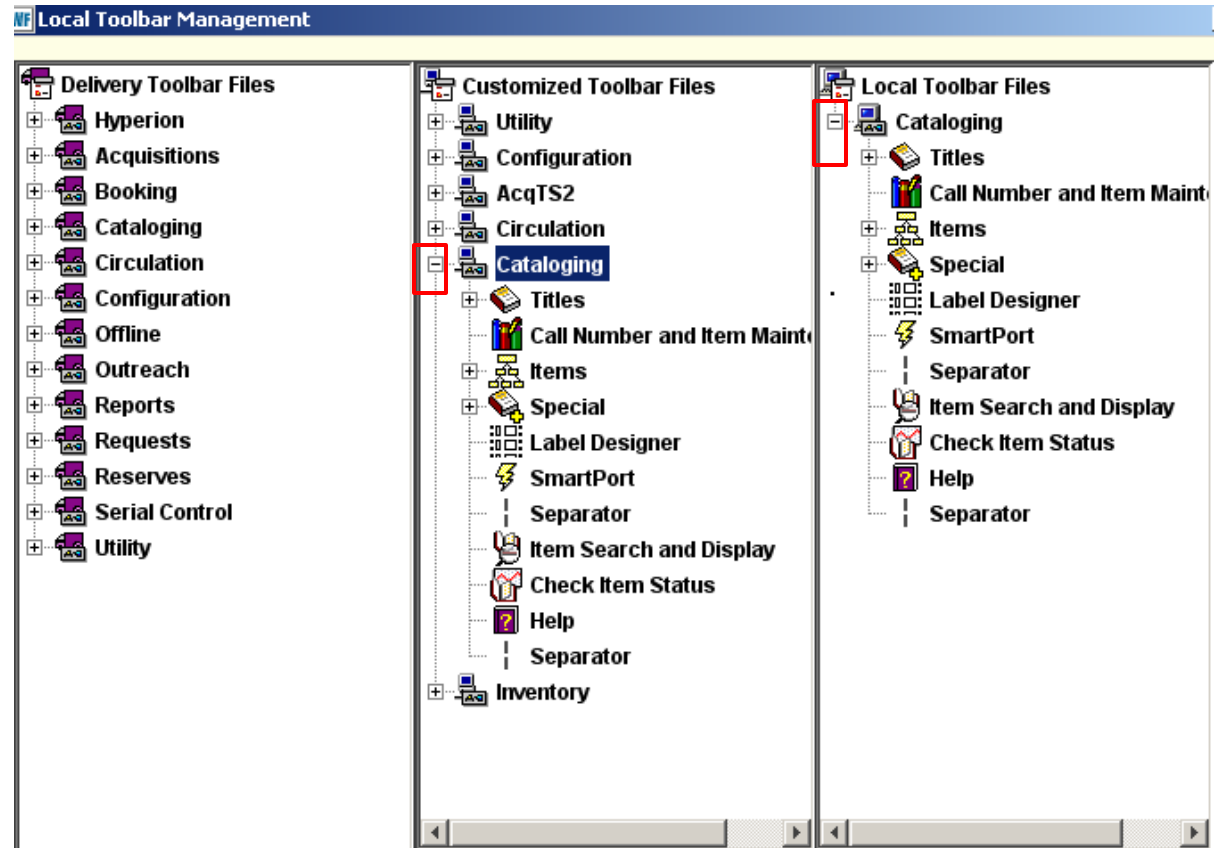
3. Click on the Copy to Local button.



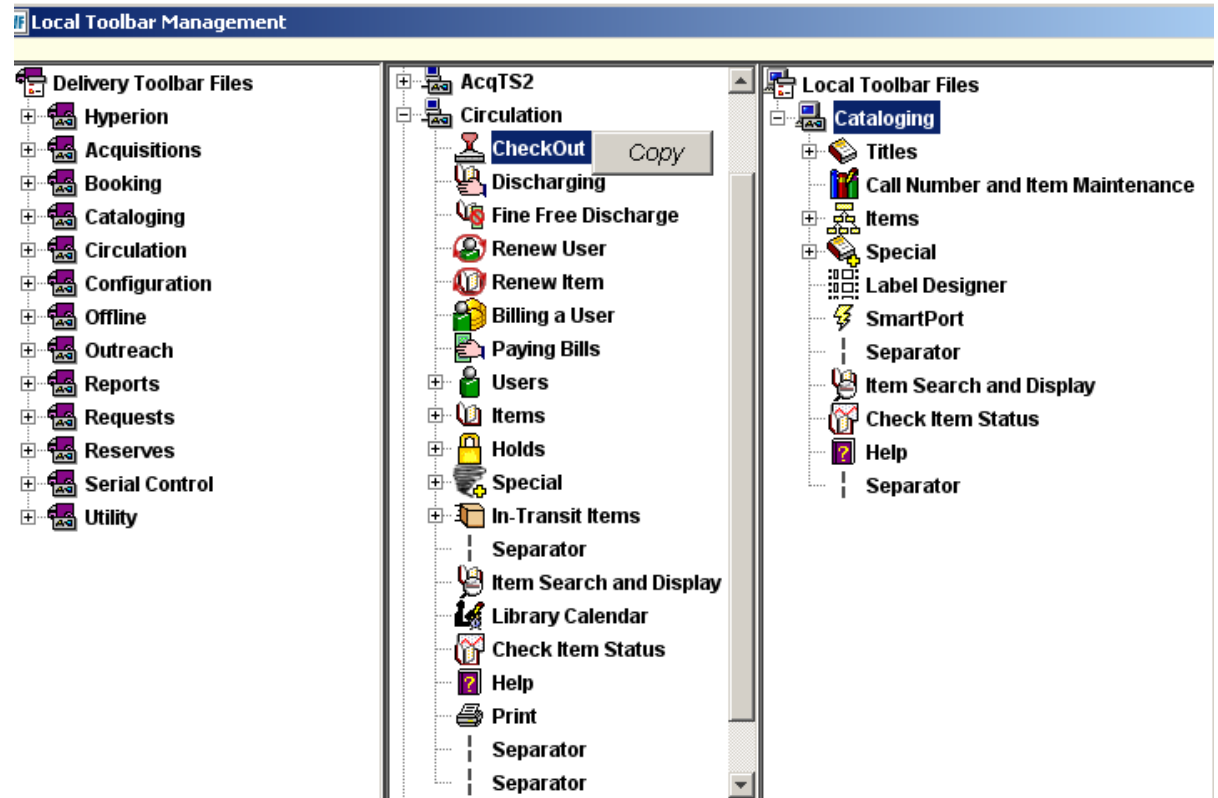
View of Cataloging Toolbar and its wizards in both Customized and Local Toolbar Files

That selected toolbar and all of the wizards associated with it will be copied to the Local Toolbar column.

4. Click on the plus sign next to the toolbar to view copied wizards. When the toolbar is opened the plus sign (+) becomes a minus sign (-).



Copy Checkout Wizard to customized Cataloging Toolbar



Add wizards from other toolbars as desired.

5. Click on the plus sign next to a toolbar to view the wizards of that toolbar. Highlight the wizard to be copied.

6. Right click on the selected wizard.

7. Click the Copy button.

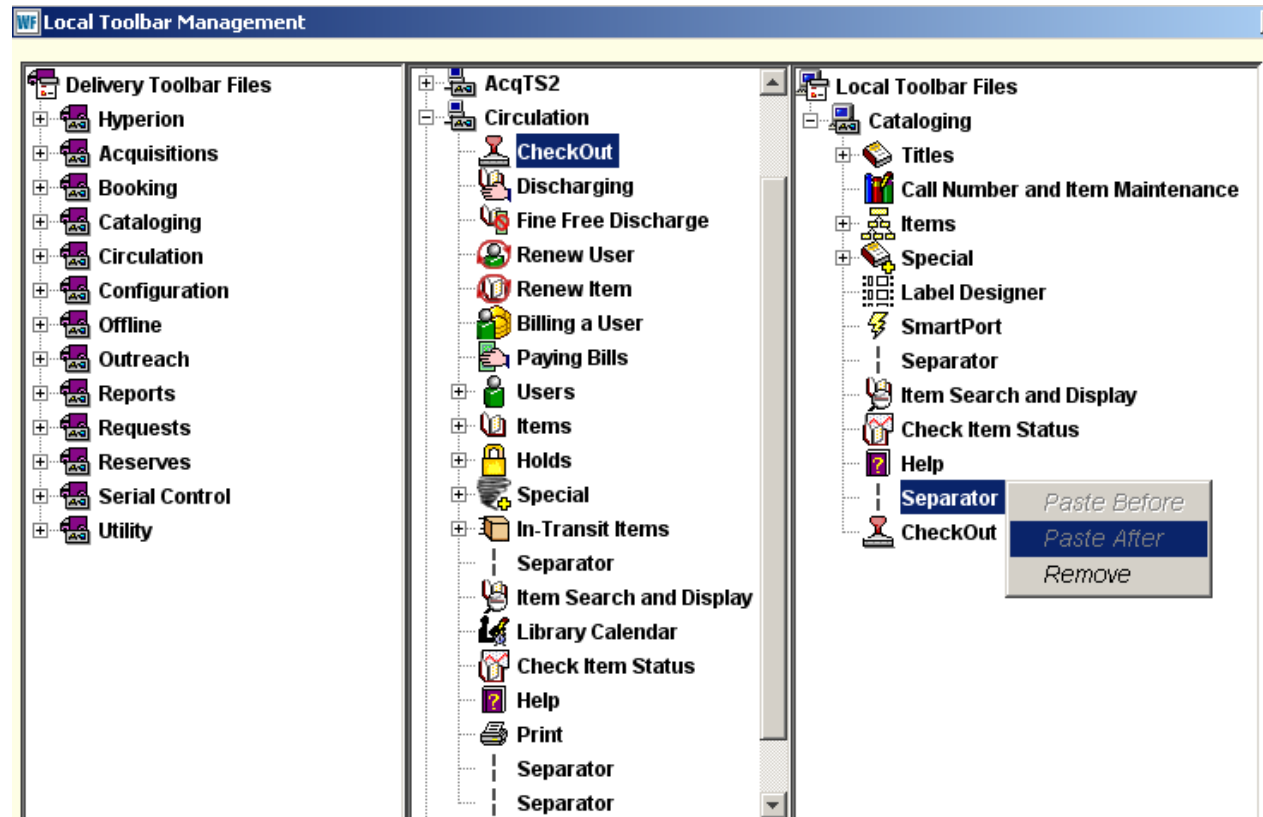
Copy Circ Checkout Wizard to customized Cataloging Toolbar

8. Determine where in the Local Toolbar you wish to place the new wizard.

9. Right click on the wizard or separator where you wish to place the new wizard.

10. Click on Paste Before or Paste After button to place the new wizard according to the option selected.

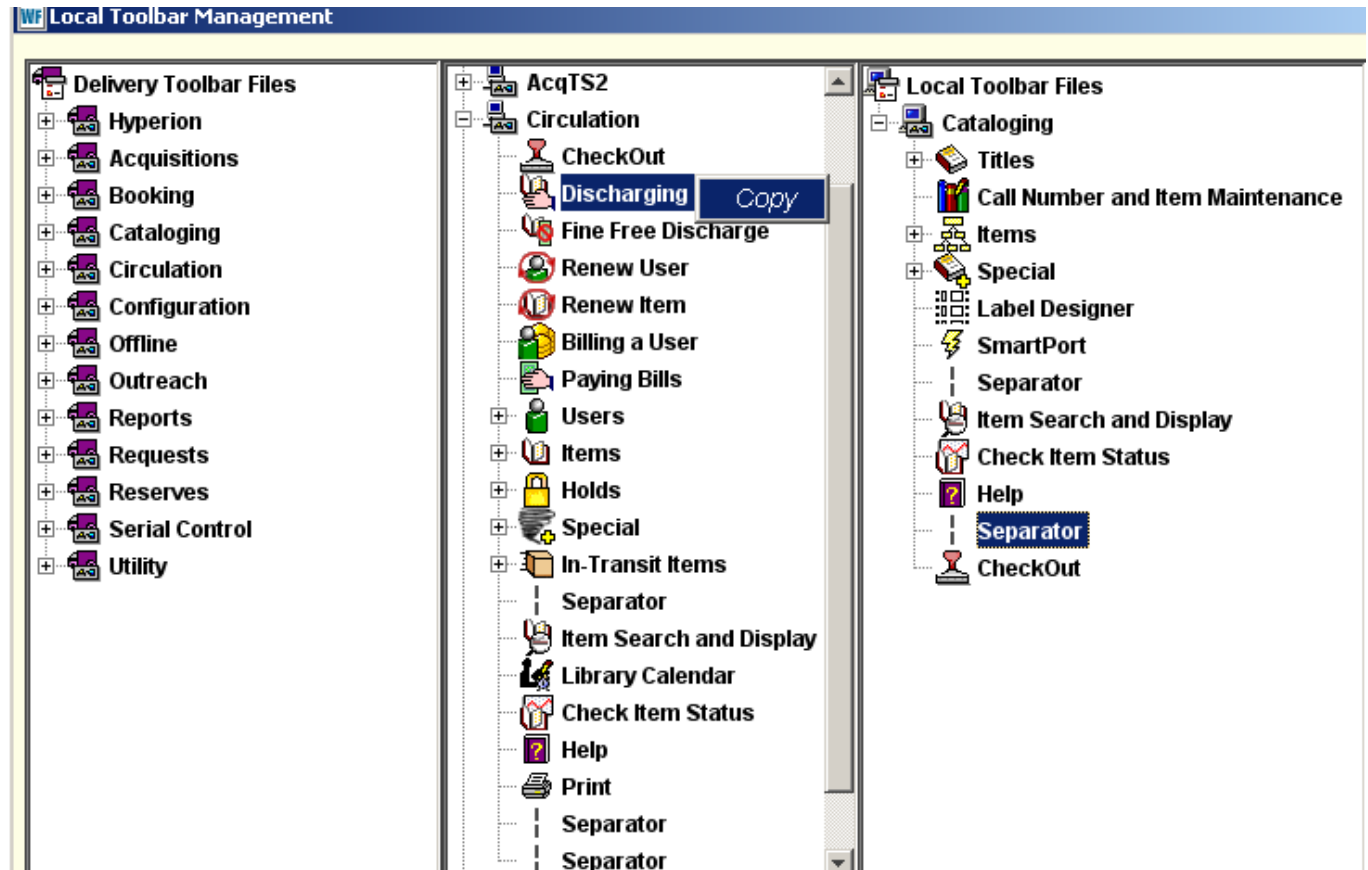
In this example the new Checkout wizard was pasted after the separator.



Discharging Wizard selected for copy

11. Select another wizard to copy.

12. Right click on the new wizard and click on the Copy button.



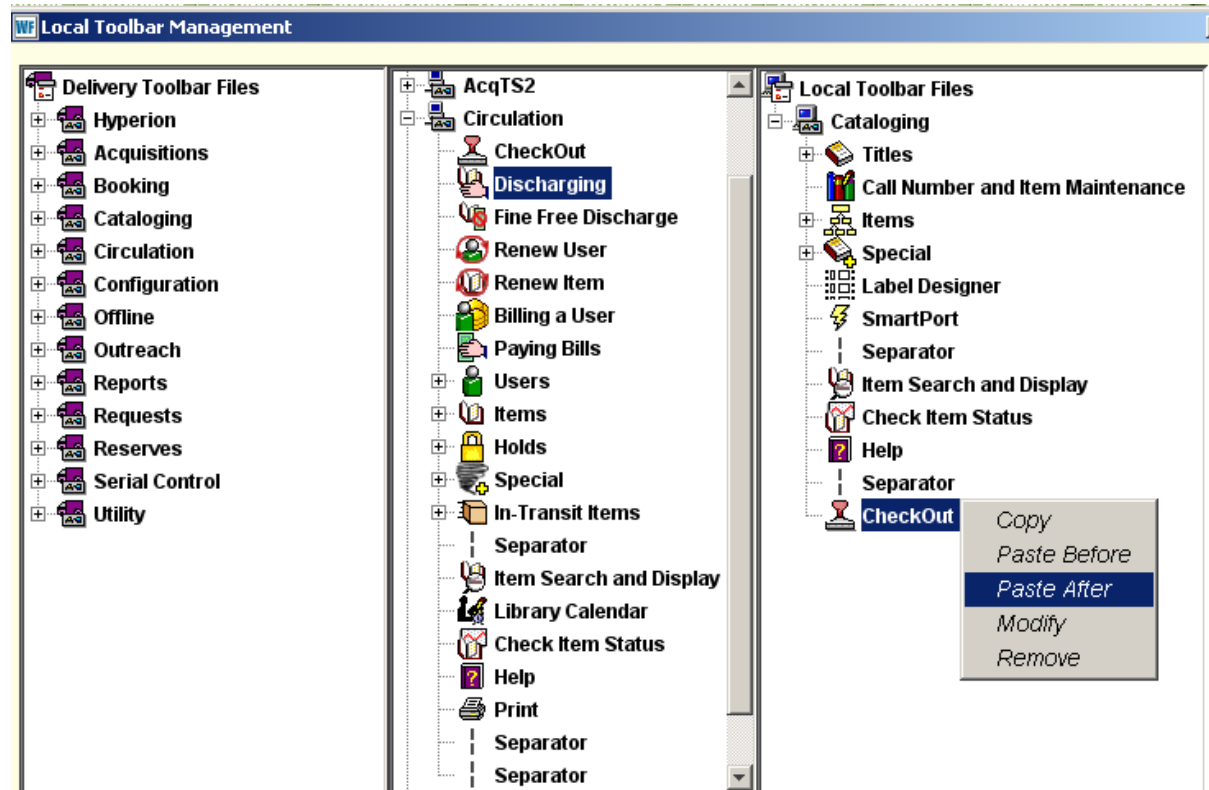
Copying Discharging Wizard to customized Cataloging Toolbar

13. Determine where in the Local Toolbar you wish to place the new wizard.

14. Right click on the wizard or separator where you wish to place the new wizard.

15. Click on Paste Before or Paste After button to place the new wizard according to the option selected.

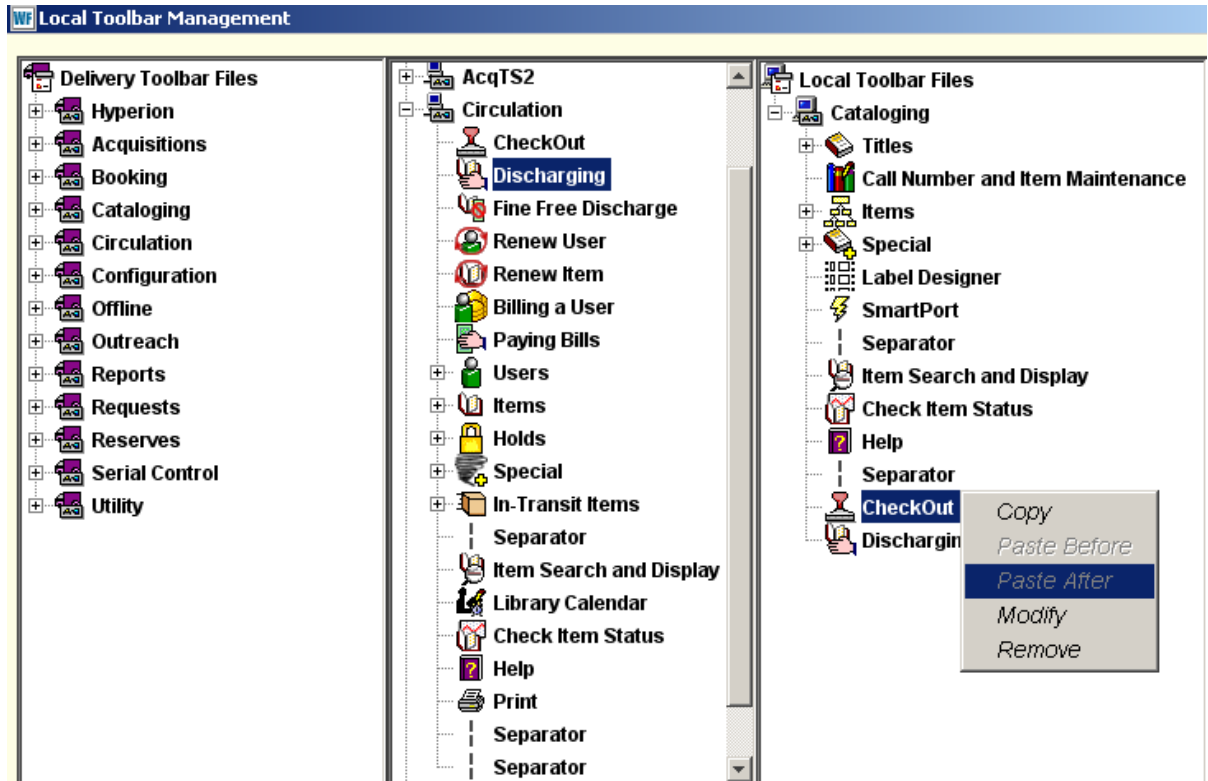
In this example the new Discharge wizard will be pasted after the Checkout wizard.



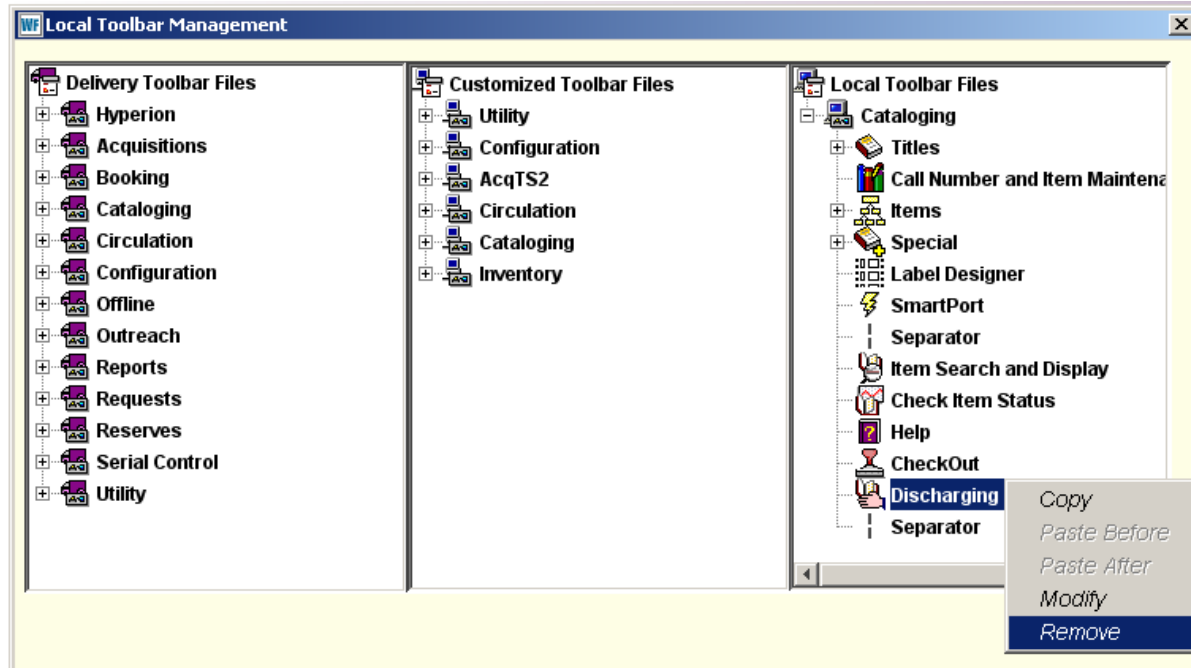
Discharging Wizard copies to customized Cataloging Toolbar

New Discharging wizard displaying in its new location in the local toolbar after the Checkout wizard.

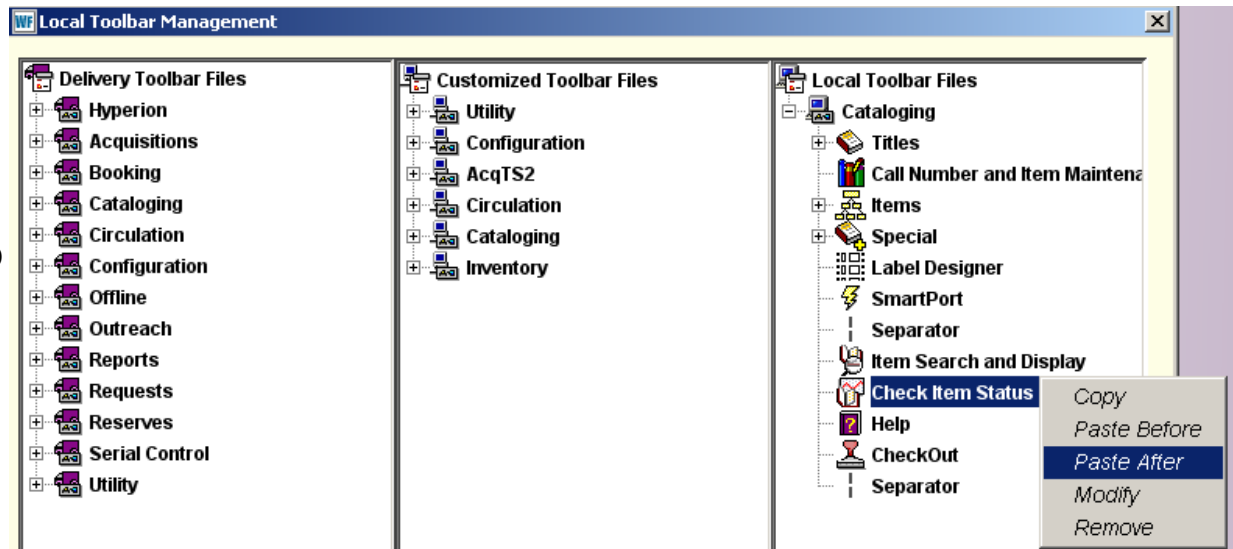
16. Continue adding individual wizards from other toolbars as desired until the Local Toolbar has all the wizards you want.

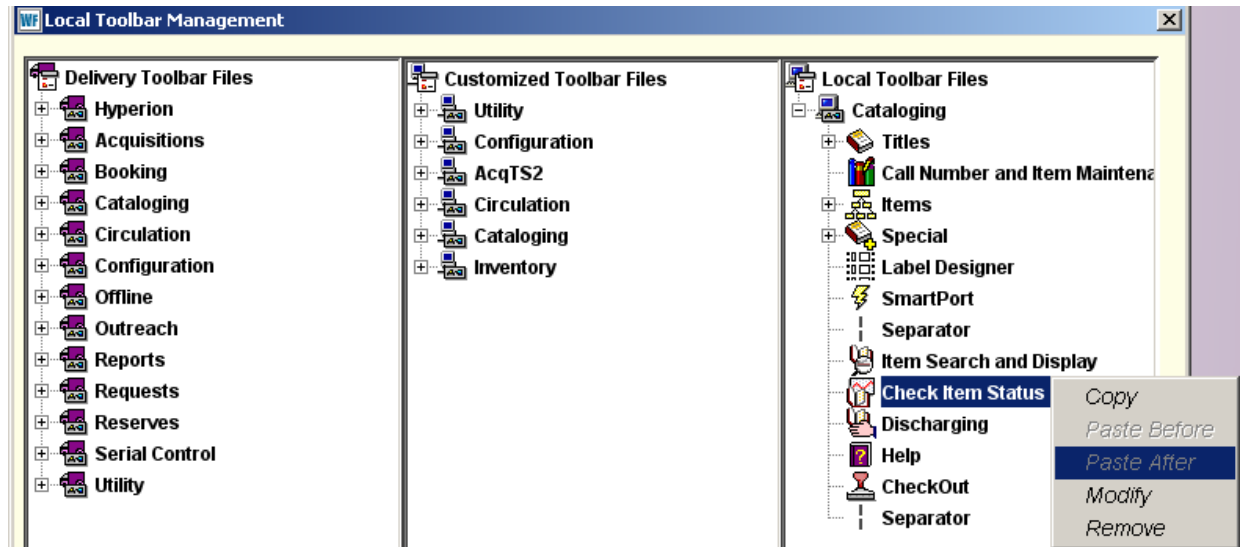


17. Move wizards around within the new Local Toolbar by right clicking on the wizard you wish to move. Click on Remove button.



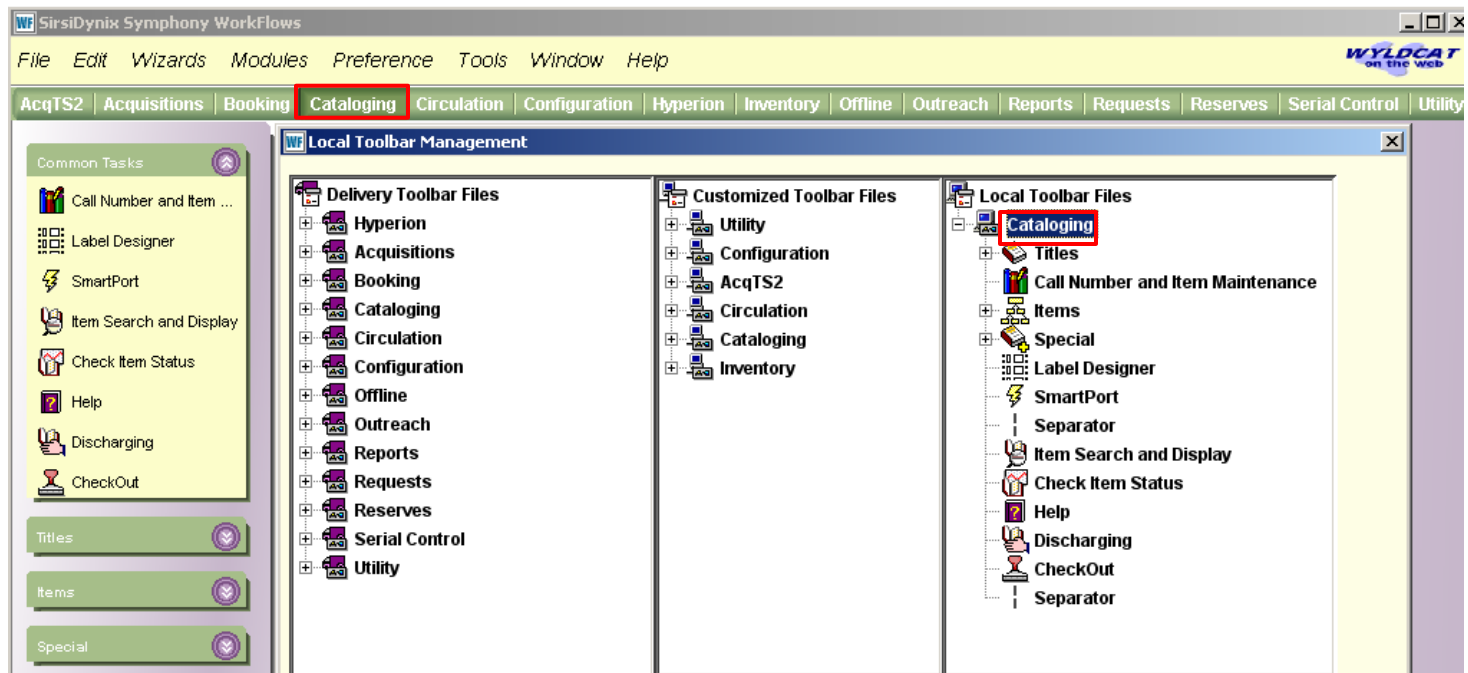
18. Determine where within the Local Toolbar you wish to move the selected wizard. Right click on a target wizard where you want to locate the wizard being moved.





19. Click on the Paste Before or Paste After button to add the wizard back into the toolbar in its new location.

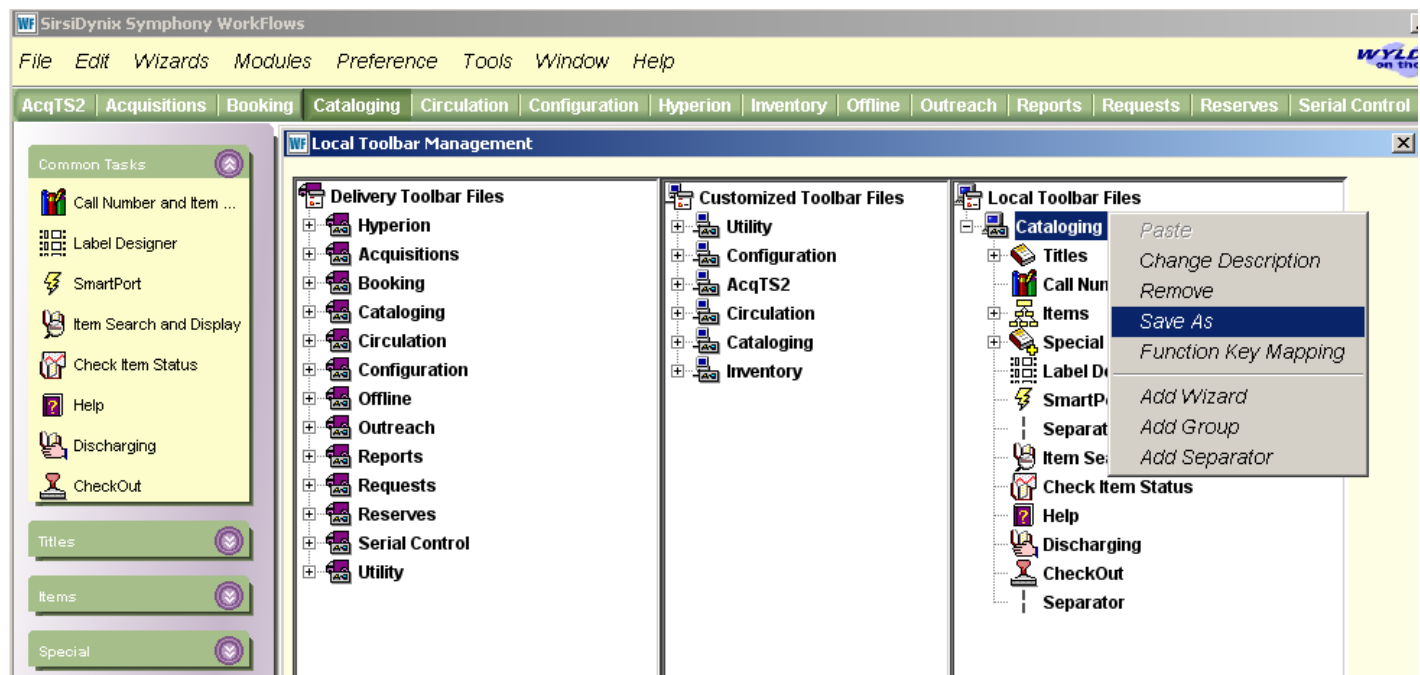
After the Customized Local Toolbar has been created, you can opt to leave the name of the toolbar as it was...in this example the new toolbar would retain the name Cataloging. This customized cataloging toolbar with its Circulation wizards would replace the Cataloging Toolbar that displays when Workflows is opened.



The second option at this point in creating a customized local toolbar is to use the Save As option from the drop down menu. This option allows you to retain the original Cataloging Toolbar and save it again under a different name.

20. Right click on the Toolbar name.

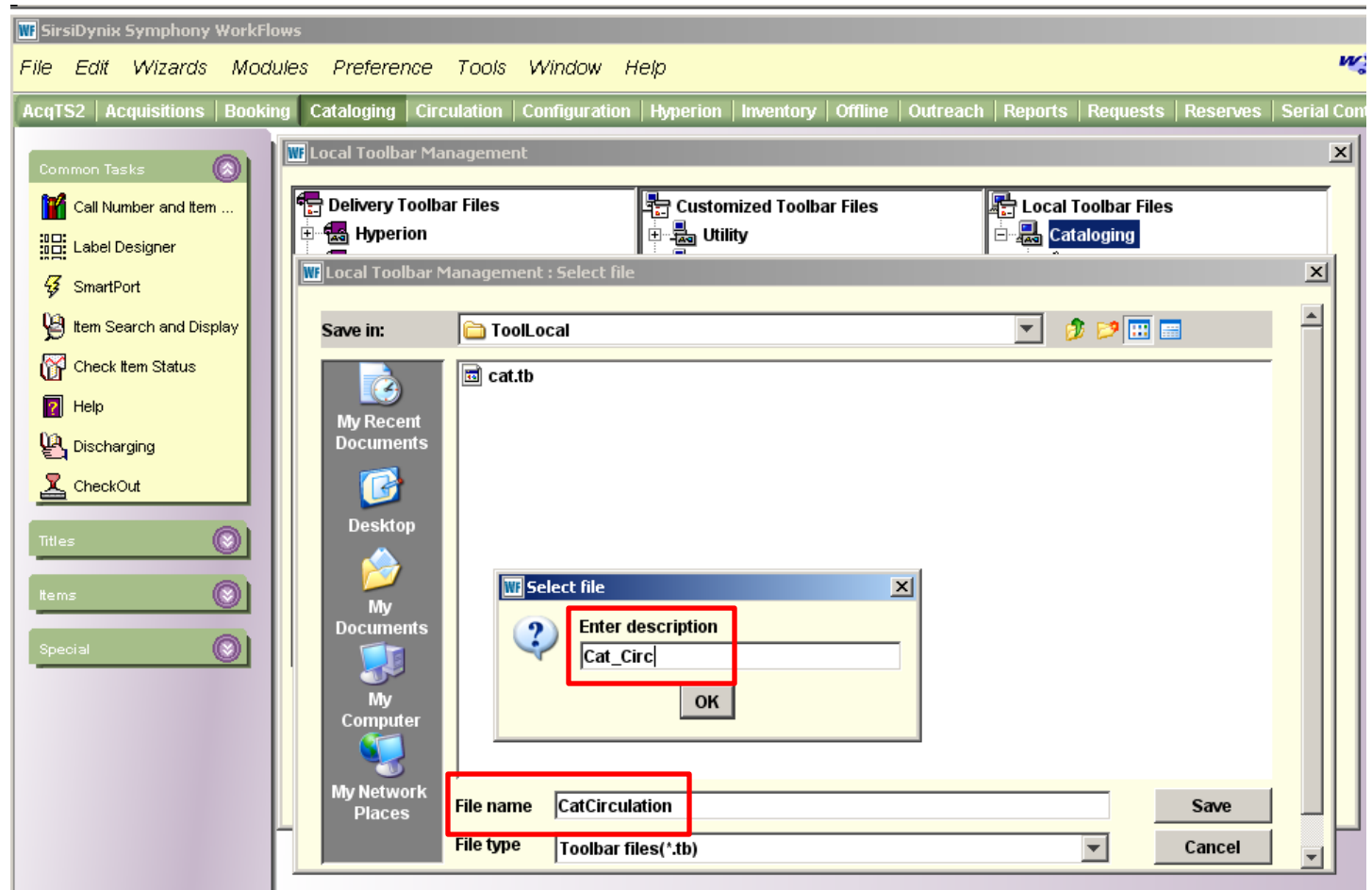
21. Click on the Save As button.



22. Enter a new File Name for the new Local Toolbar.

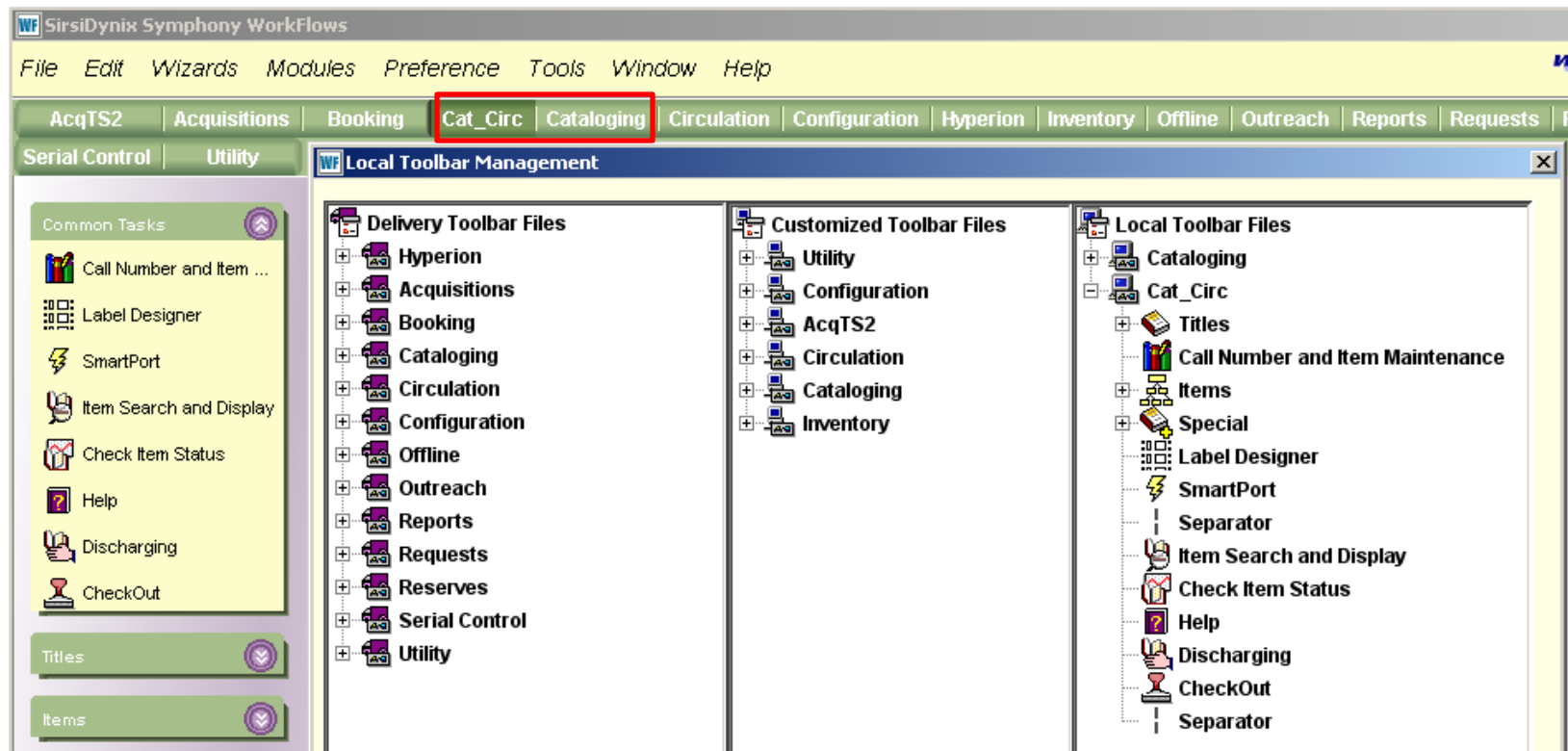
23. Enter a new description for the new Toolbar. This is the name that will display in Workflows.

24. Click the OK button.

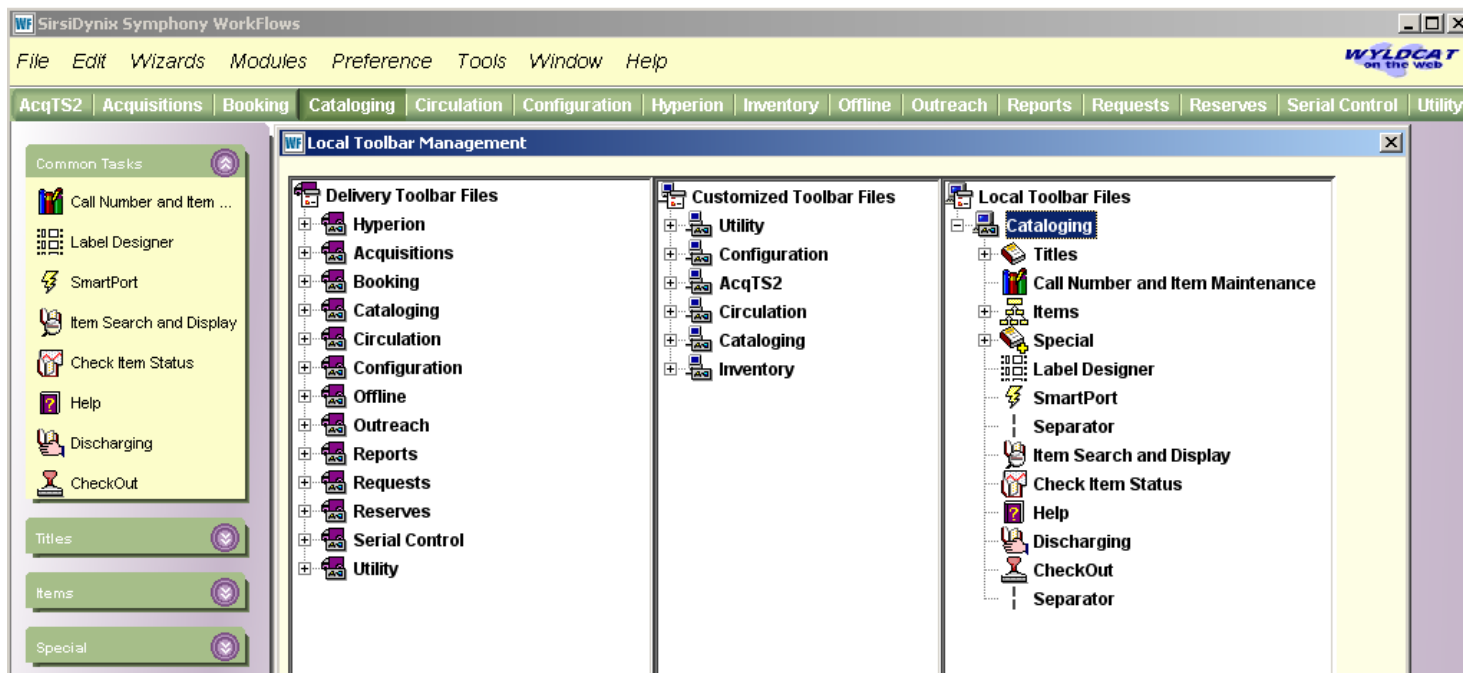


The newly saved toolbar called Cat_Circ displays on the far right in the Local Toolbar Files. Notice that the Cataloging Toolbar also displays in the Local Toolbar Files. Because this Cataloging Toolbar is the one that was created as the customized toolbar it is exactly the same as the Cat_Circ Toolbar. Therefore, the Cataloging Toolbar in the Local Toolbar Files could be removed.

****Note that both toolbars from the Local Toolbar Files are in the toolbar display across the top of the screen.**



Another option is to rename the toolbar to something else that indicates what the combined customized local toolbar contains. In the example here, the newly created local Cataloging Toolbar will be renamed to Cat/Circ which indicates what wizard functions are included. This new toolbar will replace the Cataloging Toolbar that normally displays with the other toolbars across the top of the screen.

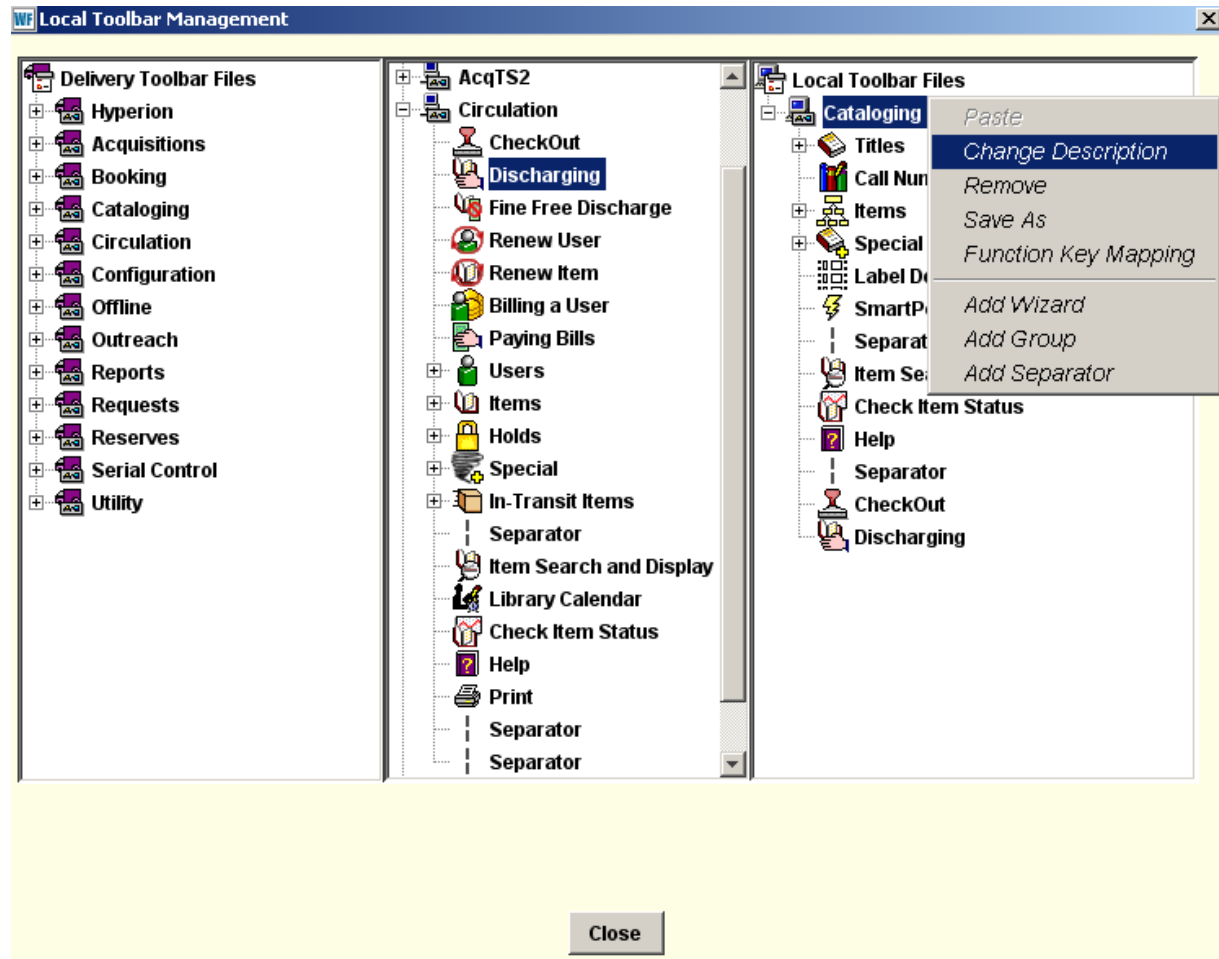


Rename Customized Toolbar

After all wizards have been added and arranged in the new toolbar as desired, the new Customized Toolbar can be renamed.

25. Right click on the toolbar name.

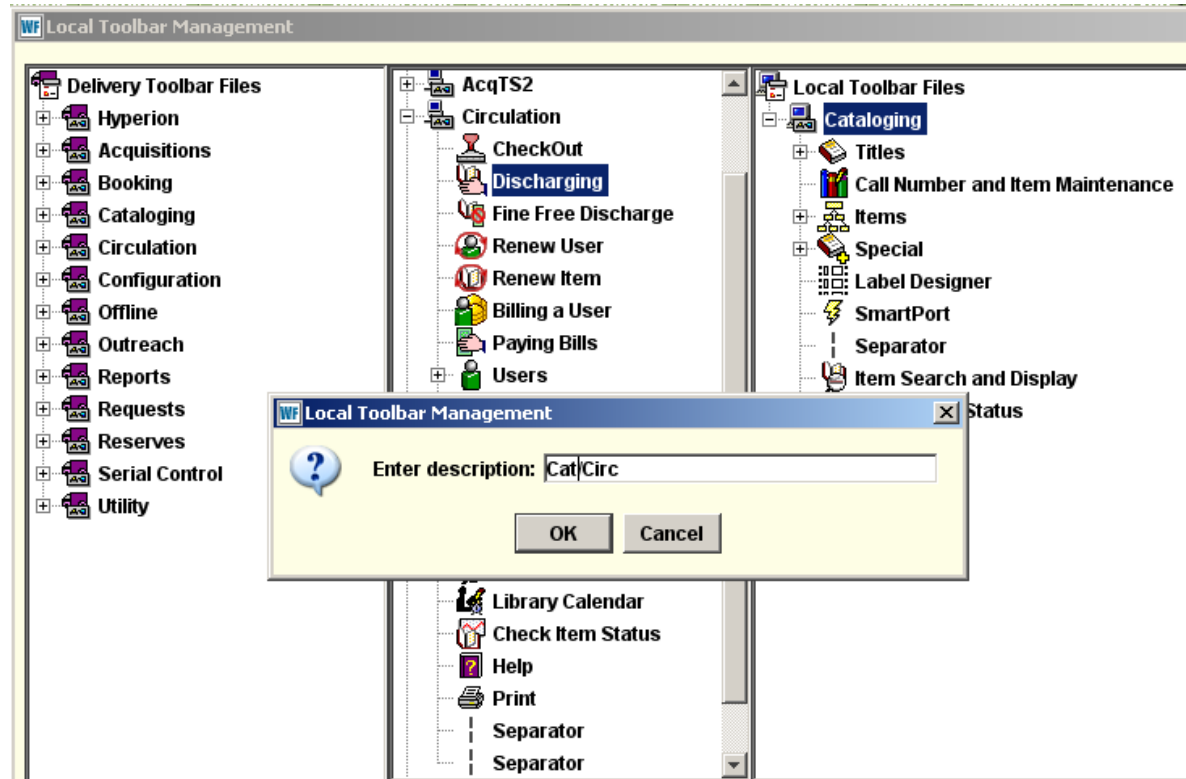
26. Click on the Change Description button.



Renaming Customized Toolbar

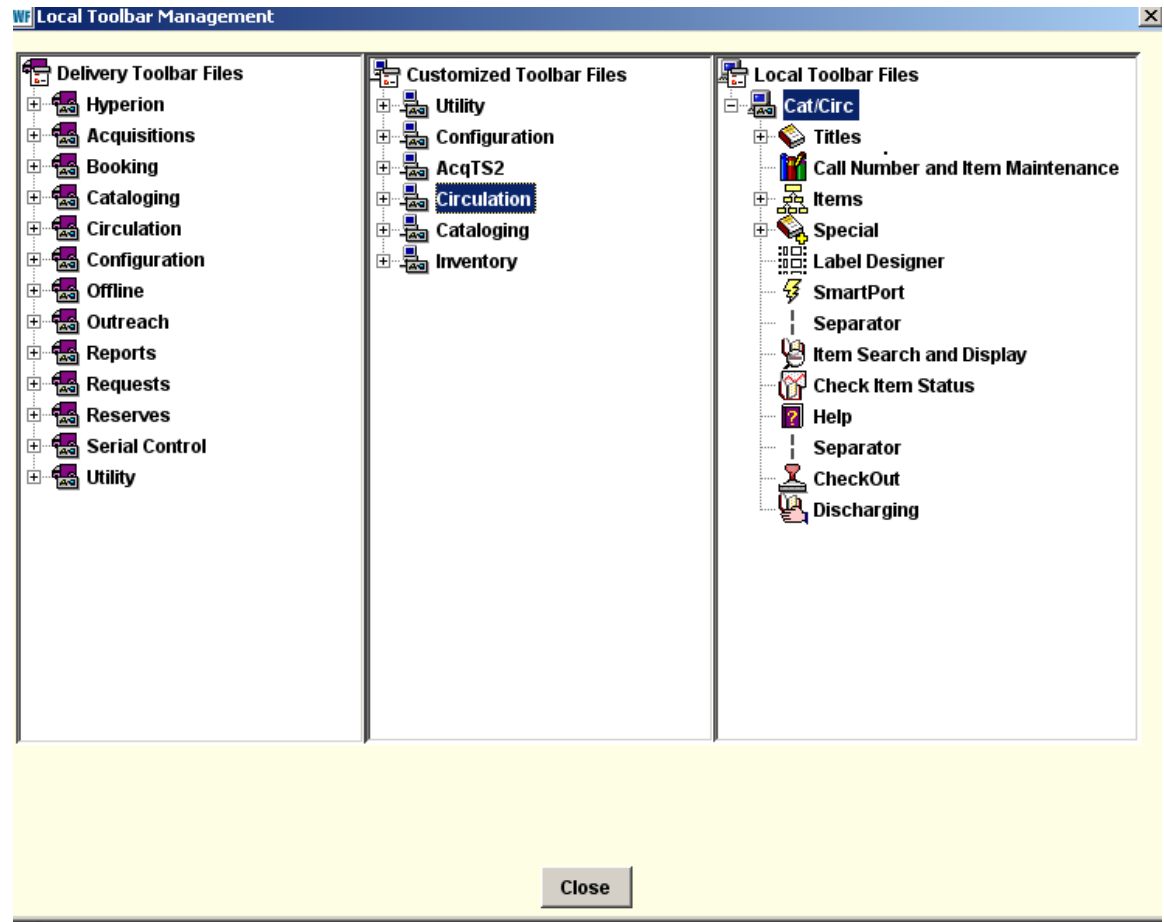
27. Enter a new description for the new toolbar. Select a name that is different from the original toolbar name.

28. Click OK button.



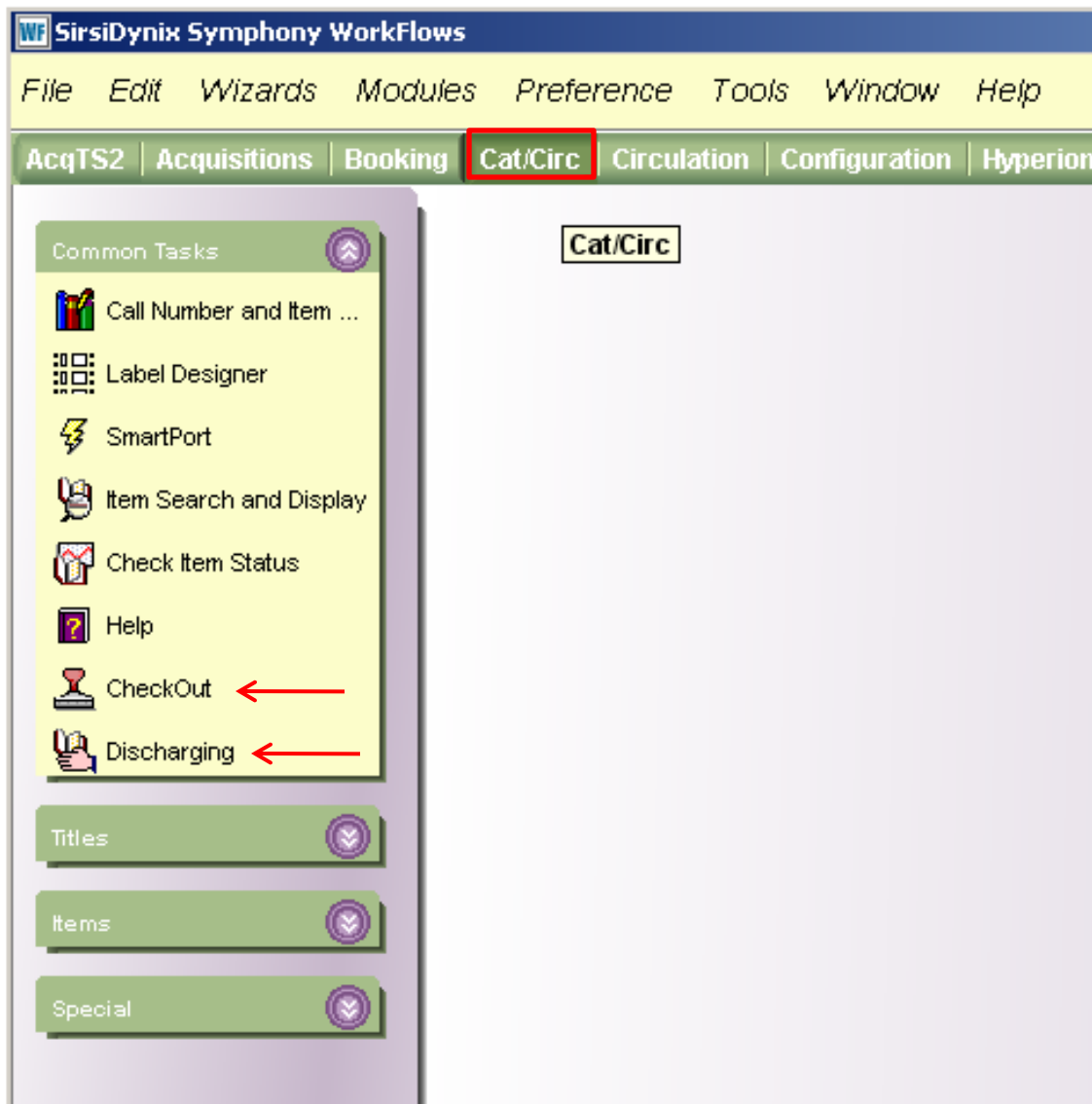
Renaming Cataloging Toolbar to Cat/Circ Toolbar

The newly renamed Local Toolbar displays on the far right.

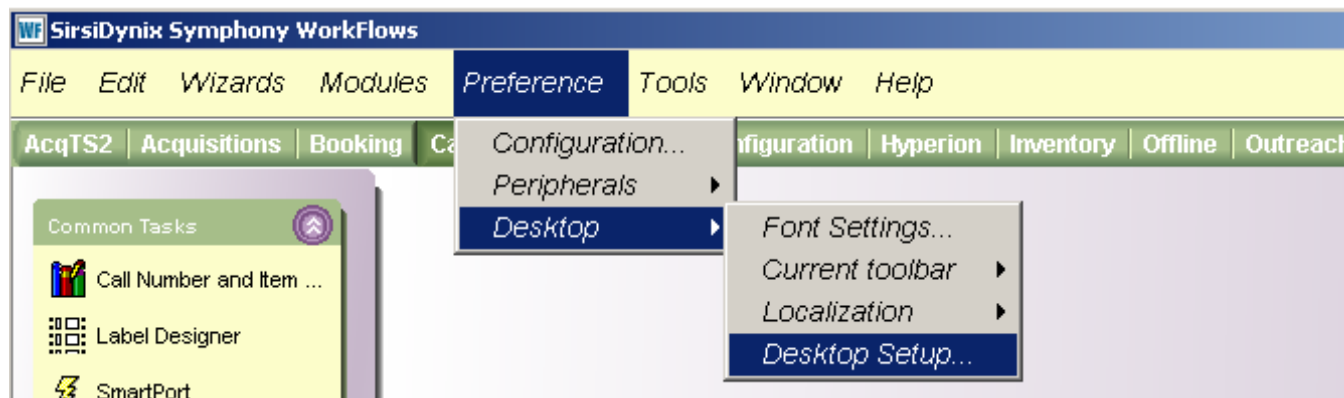


****Note that the Cataloging toolbar has been replaced with this new custom Cat/Circ Local Toolbar.**

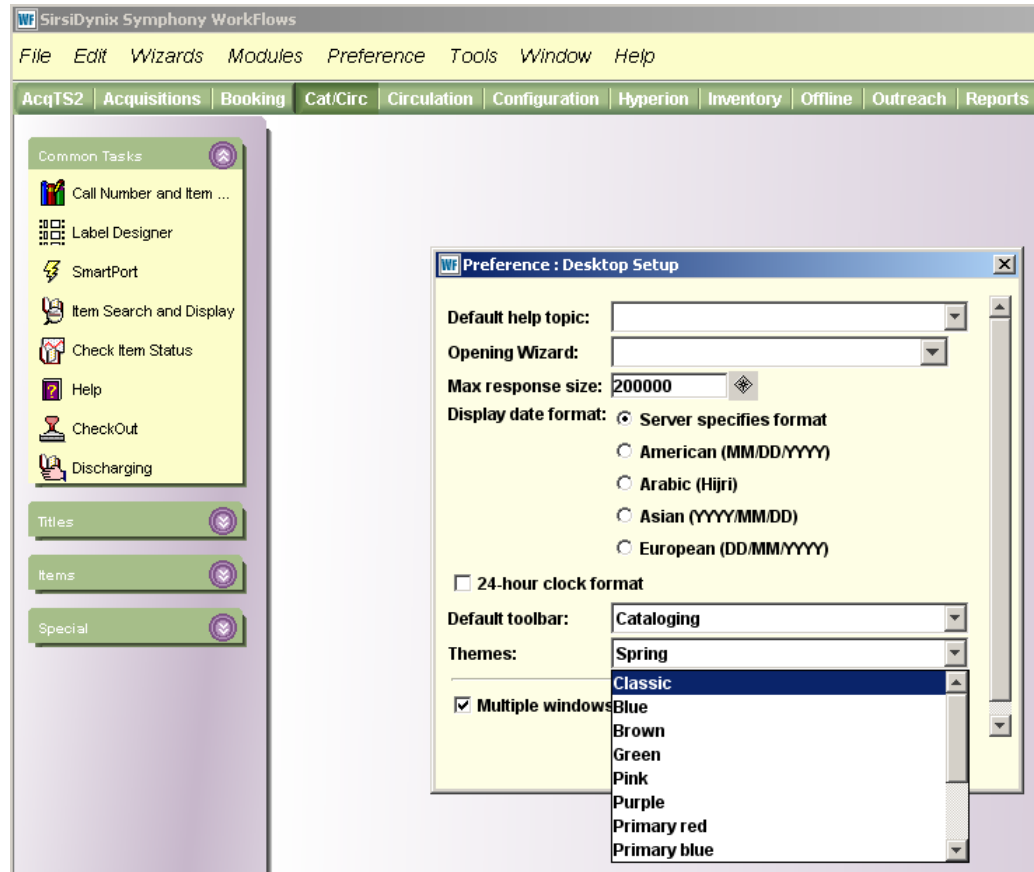
****Also Note that the two Circulation Wizards added display as the last two under Common Tasks.**



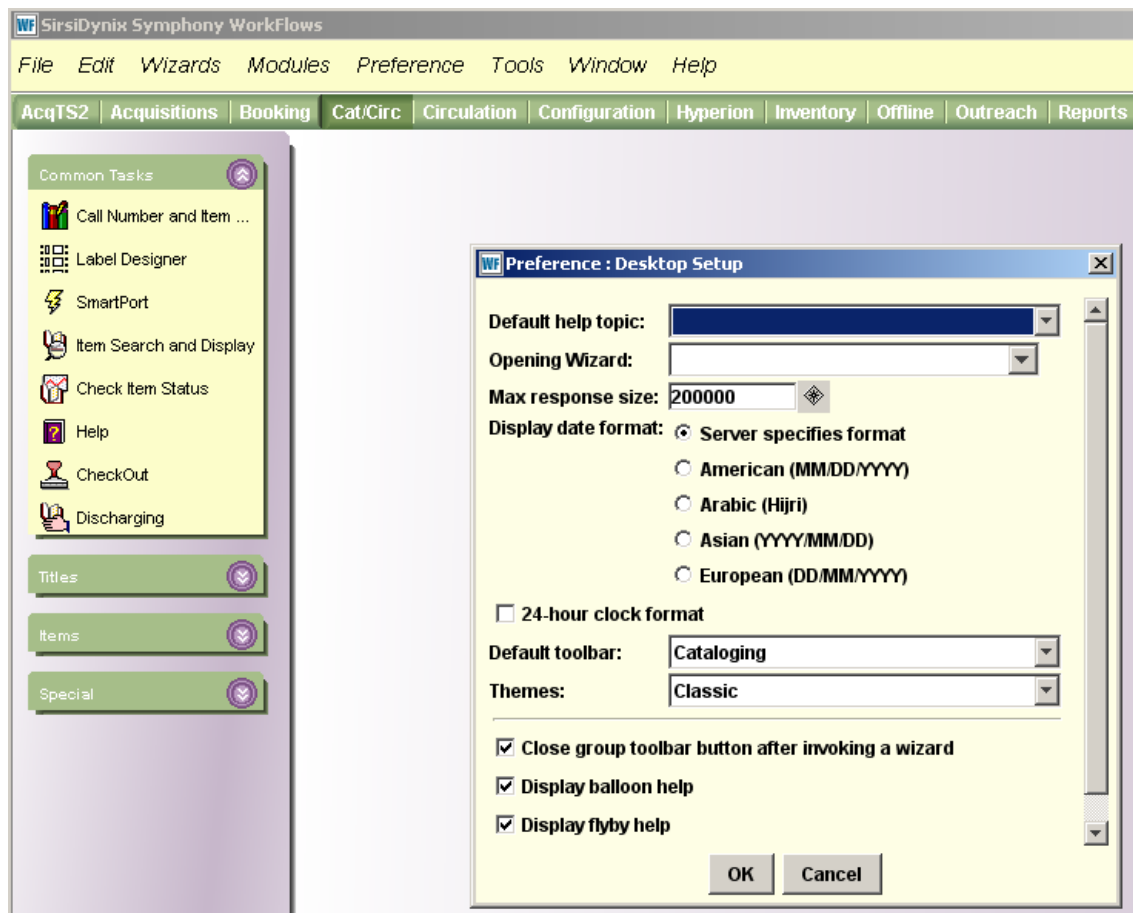
To see the new Cat/Circ Local Toolbar in the Classic view of Workflows, change the Desktop Setup as shown below.



From the drop down menu next to Themes, select the Classic view



After selecting the Classic View, click the OK button. This change will be activated when you log back into Workflows.



Display of new Customized Local Toolbar in Workflows Classic View

In this view, the wizard function is displayed only in balloon help as shown below.

